Kennedy has 'paper trail' on ads

By STEVEN W. COLFORD

Judge Anthony M. Kennedy, President Ronald Reagan's latest Supreme Court nominee, is neither good news nor bad news for the advertising industry.

The consensus is that the judge is a judicial centrist on the subject of commercial speech.

In past rulings, Judge Kennedy has held commercial speech is protected by the First Amendment, but that protection is not absolute.

In 1978, Judge Kennedy delivered the decision of the 9th Circuit Court of Appeals in California, where he has sat since 1975, in a case involving ad claims by Standard Oil of California for a gasoline additive.

In that case, Judge Kennedy upheld the Federal Trade Commission's finding that Standard Oil's TV spots for Chevron gas with F-310 were misleading.

But Judge Kennedy threw out as overly broad the FTC's attempt to prohibit Standard Oil from advertising "any" product that created a misleading impression by use of tests, demonstrations or visual means.

Judge Kennedy's advertising credo seems to rest in his statement that "commercial speech is not exempt from First Amendment protection."

In a note likely to be pored over by alcoholic beverage and tobacco marketers, Judge Kennedy said "comment on a subject of public interest must not be stifled even when it is presented in an advertising format. However, when discussion of a matter of public concern becomes a

ANTHONY KENNEDY

vehicle for sale of a product, the representations which bear on the characteristics of the product may take on increased importance in the mind of the public, and it is appropriate for the FTC to consider this factor in determining whether the advertising is misleading or deceptive."

Floyd Abrams, a noted First Amendment lawyer with the New York firm of Cahill Gordon & Reindel, said Judge Kennedy, in the Standard Oil case, "applied the commercial speech doctrine in a sound and appropriate fashion."

In one of the Standard spots, which aired in the first half of 1970, a "dirty engine" auto that emitted black exhaust smoke before receiving Chevron with F-310 subsequently emitted transparent vapor. The issue of public concern raised by the spots was pollution, and Standard's accompanying claim was "Chevron with F-310 turns dirty smoke into good, clean mileage."

Standard argued to the FTC and Judge Kennedy that their claims were true, though Standard, shortly before the FTC complaint, superimposed on the ads a message admitting the black-smoke auto had a "very dirty engine purposely used to provide severe test."

In examining the likelihood that viewers would be deceived into thinking F-310 removed all harmful chemical emissions from auto exhaust, Judge Kennedy showed some indulgence.

He said the public was not so ignorant as to accept "a patently absurd interpretation of an advertisement."

But, for the most part, he sided with the FTC, which, in its com-

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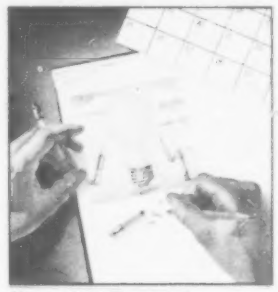

Special Report

Sales Promotion:
What makes this marketing medium work, who does the design work and how do different strategies develop? Special Report takes a close look at the anatomy of a sales promotion. Starts after Page 64.

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Audit Bureau sets agreement on bulk sales

By PATRICK REILLY

SAN FRANCISCO—National newspapers such as *USA Today* have scored a partial victory in their efforts to get bulk sales figured more prominently in Audit Bureau of Circulations reports.

At a meeting here last week, the ABC membership recommended that bulk sales be given first-page prominence on the Audit Reports and Publisher's Statements that newspapers use to report circulation. Bulk sales officially would be referred to as "third-party sales" and could not be added to the average paid circulation figures.

The recommendation is a compromise between newspapers, such as Rosslyn, Va.-based Gannett Co.'s *USA Today*, which wants bulk newspaper sales counted with audited paid circulation, and advertisers, such as J.C. Penney Co., New York, that do not want to pay advertising rates for circulation that includes bulk sales.

Bulk sales are copies sold to hotels, restaurants and other institutions for free distribution to guests or patrons.

The institutions pay at least 50% off the cover price.

"For so long, bulk sales has been a dirty word, it's been tainted," said Dan F. Pearson, director of media, RJR Nabisco, Atlanta, and leader of a two-year task force that recommended the format change. "Up to now, ABC has shoved bulk in the back of the report, in essence placing a value judgment on it. By moving up the numbers, we leave the judgment to the buyers."

K.A. Baird, publisher, *Kitchener-Waterloo Record*, Kitchener, Ontario, called the changes "buyer driven." "It's a significant step for all of us," he said. "It's a change I never thought I'd see in my lifetime."

The changes are considered

(Continued on Page 109)

'No problems'

Ohlmeyer drops Molson deal, denies rift with RJR Nabisco

By VERNE GAY

NEW YORK—Ohlmeyer Communications Co. last week said it was pulling out of a joint venture with Molson Cos. Ltd. Toronto, as part of its restructuring program.

OC (Canada) mainly produces Molson's TV hockey game productions that now will be run by Molson, which owns 51% of the joint venture.

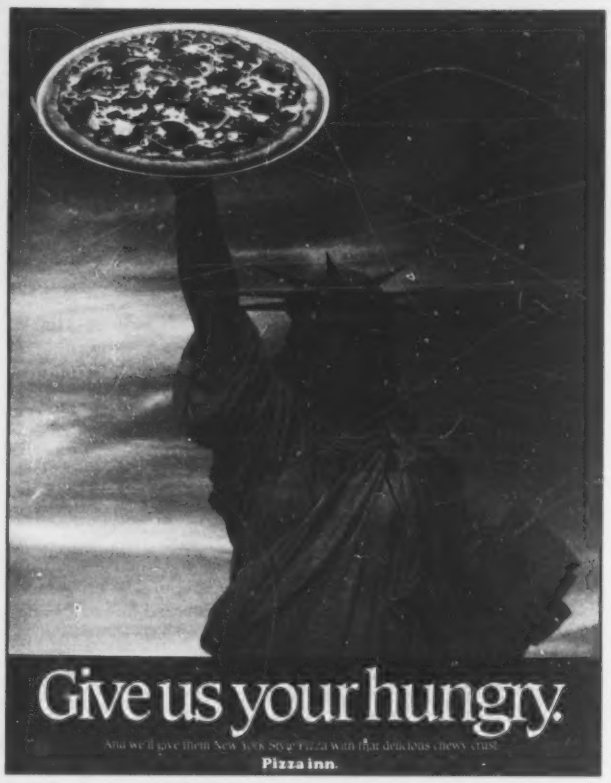
Donald Thompson, senior VP-general manager OC (Canada), said Mr. Ohlmeyer was focussing on TV production in the U.S. Ohlmeyer no longer will share in equity from the Molson joint venture or get fees from RJR Nabisco for promotional and broadcast buying duties.

In addition, Ohlmeyer no longer will handle endorsements for heavyweight boxing champ Mike Tyson. That project now will be handled by Atlanta-based RJR Nabisco.

Mr. Ohlmeyer said the moves were part of his ongoing plan to concentrate on TV and motion picture production in Los Angeles. But industry sources have noted that OCC, with 1987 revenues of approximately $40 million, is giving up several revenue streams as a result of

(Continued on Page 109)

Next week: Second 100 Leading National Advertisers



A Lady with crust

Pizza Inn today starts testing New York Style Pizza in four markets. Advertising, via Ogilvy & Mather, uses the Statue of Liberty to reinforce the product's New York origins *(see story on Page 105)*.

Healthcare giants pull plug on big ad plans

By JULIE LIESSE ERICKSON

The once-promising notion of developing brand-name healthcare services nationally may be dead, and with it, much of the industry's potential to become a major national advertiser.

Hospital Corp. of America will terminate its 18-month-old relationship with Ogilvy & Mather, New York, as of Dec. 20.

Nashville, Tenn.-based HCA will not seek another national agency of record, returning to a decentralized marketing strategy with individual hospitals contracting advertising services, a spokesman said.

HCA's decision follows by less than two weeks Humana Inc.'s termination of its two-year relationship with Grey Advertising, New York (AA, Nov. 9).

Beber Silverstein & Partners, Miami, takes over Humana's group health products—mostly its health maintenance organizations and insurance plans—and will handle media buying for individual hospitals.

Humana's goal of creating national brand-name advertising (selling the Humana name as well as individual hospitals and their services) is on hold "at least for the present," said a spokesman for the Louisville, Ky.-based company.

Although details have not been completed, the Humana spokesman said individual hospitals will be allowed to hire their own agencies pending corporate approval.

The pullbacks by the nation's two largest hospital chains temper earlier predictions that healthcare advertising could exceed $1 billion by 1990 (AA, March 9).

> "Very quickly we realized that Humana was not poised for dramatic growth but instead was in a retrenching period."
> ***—Nancy Bachrach Grey Advertising***

Healthcare remains an attractive growth market for agencies as HMO enrollment and competition both increase and as hospitals diversify and publicize their services.

But with Humana and HCA both shelving national advertising, at least temporarily, the courtship between the hospital industry and national ad agencies appears to have ended.

The industry's advertising likely will grow at a slower rate than some had earlier expected and be carried by local agencies handling smaller acounts.

Problems existed on both sides of the relationship between hospital chains and national agencies, industry observers said.

While agencies generally have been frustrated in making healthcare accounts profitable, hospital chains have been battered financially—by rising insurance premiums, stock price fluctuations and overambitious expansion plans.

The chains also have been discouraged by a lack of immediate payback from increasing their ad spending.

HCA awarded O&M what was then estimated to be an $8 million account in June 1986 after a long-term relationship with Eric Ericson & Associates, Nashville. Total measured-media spending in 1986 was only $200,000, however, according to Leading National Advertisers figures.

Although HCA was satisfied with O&M's work, the spokesman said that "with our company's restructuring, standardized or centralized advertising doesn't seem to make sense."

HCA sold 104 of its hospitals in

(Continued on Page 107)

TV will benefit the most

K mart hacks insert-ad funds

By PATRICIA STRNAD

TROY, MICH.—K mart Corp. will cut an estimated $40 million to $45 million from its in-house newspaper insert ad program next year and channel those funds into other media, primarily TV.

The shift demonstrates the No. 2 retailer's determination to shed its old flashing-blue-light personality by using image-builders such as upscale food and entertainment expert Martha Stewart (AA, Aug. 24).

K mart is betting its traditional customers are more sophisticated and want better lifestyles than in the past, even though their buying power has not changed.

The changes under way at K mart could be as revolutionary as the first K mart store 25 years ago, which launched the retailing idea of a suburban discount supermarket for non-food items, said retail analyst Fred Marx, president of Marx Management Co., Birmingham, Mich.

"I think now K mart's in a position where it will be doing some more trailblazing," Mr. Marx said.

K mart ad agency Ross Roy Inc., Bloomfield Hills, and its New York-based subsidiary, Calet, Hirsch & Spector, together handle less than $65 million, or 12%, of the estimated $540 million spent on advertising for the 2,200-plus K mart retail stores.

An estimated 88%, or $475 mil-

(Continued on Page 106)

Jobs: No layoff relief

By JON LAFAYETTE

Will the big agencies continue to shrink their staffs next year? So far, there are no signs that business pressures squeezing payrolls are letting up.

"We're all looking at how we can get the job done more efficiently," said Roy Bostock, president of D'Arcy Masius Benton & Bowles, New York.

Of the 10 U.S. agencies that employ the largest numbers of advertising workers, seven reported job counts have declined this year.

The total loss for the seven, in the Jan. 1-to-Oct. 1 period, was 1,486 positions. Three agencies reported their staffs had grown by a cumulative total of 573 employees, for a net loss of 913 jobs among the top 10 employers.

The tally, and the ranking of top agency employers, is based on data supplied by the agencies and excludes non-advertising units, such as public relations and TV program

(Continued on Page 92)

Who's tightening up staff

Top ten U.S. advertising agencies—measured by employment—have cut staff by a total 4% since the beginning of the year, when the workforce equalled 22,813. Figures below are total agency employment excluding public relations. *Source*: The agencies cited.

	Jan. 1, 1987	Oct. 1, 1987	Change
Young & Rubicam[1]	2,900	3,100	+ 6.9%
Ogilvy & Mather	2,840	2,657	– 6.4
Foote, Cone & Belding[2]	3,051	2,636	–13.6
Grey Advertising	2,238	2,440	+ 9.0
J. Walter Thompson	2,200	2,000	– 9.1
Leo Burnett	1,768	1,939	+ 9.7
DMB&B[3]	1,981	1,878	– 5.2
BJK&E	2,066	1,840	–10.9
DDB Needham	1,899	1,705	–10.2
Saatchi & Saatchi DFS	1,870	1,705	– 8.8

[1]Includes wholly owned Wunderman Worldwide and Cato Johnson/Y&R. Excludes joint ventures.
[2]Estimated 200 employees from PR units were subtracted to get these totals; also, yearend '86 figures include employees of Deutsch, Shea & Evans, San Francisco; North Castle Partners, Greenwich, Conn.; and Carl Byoir & Associates, New York. These units were divested at yearend.
[3]Excludes specialty ad units: Medicus International—91 as of Oct 1, (92 as of yearend '86); Direct Inc., 28 (27); Intergroup Marketing & Promotion, 79 (66).

Layered look loses favor

By JENNIFER LAWRENCE

While the nation's top ad agencies are cutting staff, some midsize agencies are re-examining and sometimes eliminating layers of management.

"Some agencies are doing this offensively and others are doing it defensively," said Michael Lesser, chairman-ceo of Lowe Marschalk, New York. "The industry is asking, 'How will the premier agency of the future be structured to be successful?' "

Few agencies are willing to identify specific restructuring because of the sensitivity of employees to possible layoffs.

Many of the midsize agencies have been prodded to rethink their structures because that is what major clients are doing. "We can't walk into an agency pitch with 10 people when the client only has two," said one agency source. "He starts wondering whether he is going to have to pay for all these people."

Robert Bloom, chairman-ceo of the Bloom Cos., Dallas and New York, has come up with a plan for his agency that he said will meet clients' needs and improve his agency's bottom line.

The answer is to reduce—not eliminate—the middle-management layer in account service, creative and media departments, Mr. Bloom said. In this way, the organization would be heavy on the bottom for support functions and heavy on the top at decision-making levels.

Instead of the traditional organization in the shape

(Continued on Page 92)

World News Roundup

LONDON—Abbey National Bank chose Saatchi & Saatchi for a $15 million account to launch new financial services, including checking accounts, high-interest accounts and a pension plan.

TOKYO—An advertising tax is being considered by the Japanese government's Tax Advisory Committee, sources say. Last year, the Diet, Japan's parliament, forced former Prime Minister Yasuhiro Nakasone to withdraw a proposed ad tax.

LONDON—Samsonite moved its estimated $6 million pan-European account to Grey Advertising from TBWA.

DUESSELDORF—The planned merger between Eggert/DYR and HCM to form HDM (AA, July 20) has been delayed. Both agencies continue to work independently and as competitors as negotiations continue.

LONDON—An anti-fur-coat spot, via TBWA, has been banned from major cinema chains here for being too gory. The 90-second spot

(Continued on Page 75)

Cigarette sales expected to drop by 2.5% this year

By JOHN C. MAXWELL JR.

Cigarette sales are expected to reach about 568 billion units this year, a 2.5% decline from 1986.

While 1986 industry shipments declined 2.1% compared with '85, sales were helped by a sizable increase in trade inventory buying during the fourth quarter. This inflated '86 volume and caused weak sales in first-quarter '87.

We continue to believe that the industry's real rate of decline is between 1.5% and 2%. This would make it appear that the consumption downtrend is abating somewhat, though the long-term outlook is one of a decline.

It appears unlikely that the cigarette federal excise tax will increase within the next several months, if at all. Therefore, 1987 industry sales should be unaffected by either inventory swings that would accompany an excise tax hike or by a change in the underlying consumer demand.

Examining market share trends, only three companies are expected to turn in positive performances in 1987. Philip Morris Cos., the market leader since 1983, advanced 1.1 share points. New York-based PM's 37.9% market share will be another record and the highest any cigarette company has attained since the early 1930s.

PM has widened its lead over second-place R.J. Reynolds Tobacco Co. by more than 5 share points and was the only company to be up in units. Nevertheless, RJR, Winston-Salem, N.C., managed to improve by 0.3 share points, thanks to the rapid growth of its "branded generic" Doral, up 44%.

Brown & Williamson Tobacco Corp. had a larger decline in 1987 than a year ago and fell 0.9 points. After successfully test-marketing Capri, a stylish, superthin women's cigarette, Louisville, Ky.-based B&W is expanding the brand in a national rollout.

Lorillard, which had maintained share last year, gained a 0.1 point in 1987 due to Newport's 10% volume gain. New York-based Lorillard is the only company without an entry in the price/value segment.

American Brands continued to decrease at the same rate as previously—0.3 points—and Liggett & Myers Tobacco Co., Durham, N.C., also had a 0.3 point share decline.

As has been true since 1983, the price/value segment is the industry's most dynamic area. It is expected to achieve 10% of the industry's volume by yearend, up 11% compared with last year.

The branded-generics subsegment, primarily represented by Doral and Cambridge, is responsible for the price/value growth. The b&w generics continued to erode, while the value 25s largely were unchanged.

The largest branded generic, RJR's Doral, had introductions of Ultra Lights and Full Flavor packings in late 1986. The brand achieved a 3% overall market share, which is more than 30% of subsegment sales. RJR has 38.6% of the low-price market overall.

Philip Morris' Cambridge, with two new full-flavor packings launched last June, captured 1.1% of the market. This increased PM's price/value share to 14.9%.

Brown & Williamson, whose generics/private-label brands and Richland 25s entries have stabilized, has a 21.8% subsegment share, down almost 5 share points from last year.

American Brands became a contender with Malibu, a "promotional" brand with a $3-off-carton coupon or a 30¢-off-pack coupon.

Liggett & Myers, whose generic/private-label brands experienced weakness, suffered the largest price/value segment loss.

By contrast, the full-price segment has dipped to 90% of the market. PM led the industry with a gain of 1.2 percentage points in this segment. Marlboro, for the 23rd consecutive year, enjoyed substantial share growth and was ahead by 0.9 points for 1987. The brand hit an all-time high market share of 23.9%. This, coupled with the introduction of new Ultra Lights extensions from Virginia Slims, further improved PM's full-price performance.

RJR's full-price brands—Camel, More, Salem and Winston—each experienced small losses. However, Now, with about a 1% market share, grew slightly.

B&W's flagship Kool brand continued to fall 0.5 points, while its other major brands declined marginally. Although the impact of Capri has yet to be felt, B&W had the largest full-price segment loss of 0.6 points.

Newport, Lorillard's leading brand, was the only other full-price brand to expand sales, with a 0.5 points share advance.

In the top 10 standings, Newport moved to fifth position from eighth and was up 10% in unit volume, one of the fastest-growing cigarettes in the group.

Doral's 44% growth (this may be a conservative estimate) made it the 10th-largest-selling cigarette in the U.S., knocking out American Brands' Pall Mall from that position. Thus, Doral, Marlboro and Newport were the only three cigarettes in the top 10 that were up in absolute volume.#

Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.

Shares of cigarette market

	1986	1987*	Change
Philip Morris	36.8	37.9	1.1%
R.J. Reynolds	32.3	32.6	0.3
Brown & Williamson	11.7	10.8	−0.9
Lorillard	8.1	8.2	0.1
American Brands	7.2	6.9	−0.3
Liggett	3.9	3.6	−0.3
Total	100.0	100.0	

*Figures estimated. *Source:* John C. Maxwell Jr.

Cigarettes' top ten

Source: John C. Maxwell Jr.

Company / Brand	Units 1986	Units 1987	Per cent 1986	Per cent 1987
Philip Morris				
Marlboro	134.19	135.70	23.0	23.9
Benson & Hedges	25.36	23.70	4.4	4.2
Merit	23.15	22.40	4.0	4.0
Total	182.70	181.80	31.4	32.1
R.J. Reynolds				
Winston	65.33	63.12	11.2	11.1
Salem	45.18	44.01	7.8	7.7
Camel	25.10	23.56	4.3	4.2
Vantage	18.73	17.99	3.2	3.2
Doral	12.36	17.75	2.1	3.0
Total	166.70	166.43	28.6	29.2
Brown & Williamson				
Kool	37.19	33.84	6.4	5.9
Lorillard				
Newport	22.29	24.55	3.8	4.3
Total, top 10	408.88	406.62	70.2	71.5

Syndicated cartoons off to good start

NEW YORK—"Beverly Hills Teens," "Duck Tales," "Real Ghostbusters" and "Visionaries" got off to promising starts in the children's cartoon syndication season, Petry Television says.

Petry's assessment was based on A.C. Nielsen Co. and Arbitron data for 15 metered markets from Sept. 7 to Oct. 2.

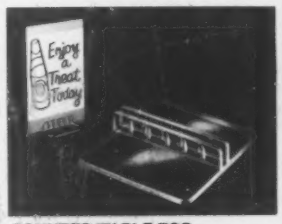
"Teddy Ruxpin" showed mixed results while "Bionic Six," "BraveStarr," "Captain Power," "The Comic Strip," "Dinosaucers," "Kid-Songs," "Saber Rider" and "Spiral Zone" fared poorly.

"BraveStarr," "Captain Power," "Ruxpin," "Spiral Zone" and "Visionaries" are based on toy products.

Separately, New World Television's "Marvel Universe," due in fall 1988 syndication, will add "RoboCop" to the weekday afternoon package. "RoboCop" joins the previously announced "Captain America" and offnet reruns of "Spider-Man" and "Incredible Hulk."#

3 more great ideas from...

Fasteners For Retail



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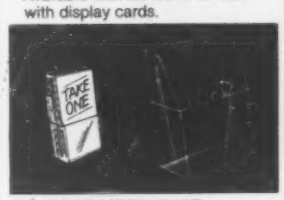

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To Reach Households With Children Age 6–12 Directly Through Our Exclusive "IN-SCHOOL" Fall Marketing Promotion.

Now in its 7th Big Year, our SUPER SAFETY "Trick-or-Treat" Bag™ Program for Halloween offers outstanding Sales Increases, Trade Awareness, and Support through no waste couponing and sampling.

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Advertising pages for U.S., Canadian and foreign consumer publications

NOVEMBER

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
— Art & antiques —				
Art & Antiques (10X)	77.5	69.3	666.7	517.4
Art News (10X)	150.0	98.0	1,049.9	878.9
Southwest Art	80.2	82.8	948.9	821.1
Total Group	307.7	250.1	2,665.5	2,217.3
% change		23.0%		20.2%
— Auto/cycle/rec. vehicles —				
ATV Sports	45.1	46.9	468.2	612.2
Autoweek (52X)	195.3	124.2	1,685.6	1,514.8
Car & Driver	96.2	89.1	1,027.0	952.9
Car Collector & Car Classics	18.5	23.0	191.5	187.2
Car Craft	75.7	68.8	940.7	814.8
Circle Track	69.4	58.1	833.3	667.8
Cycle World	32.4	26.3	533.7	478.1
Dirt Rider	59.1	34.9	401.7	421.7
Dune Buggies & Hot VWs	72.7	81.7	835.6	956.9
Family Motor Coaching	158.6	134.5	1,716.6	1,586.7
4 Wheel & Off-Road	92.0	89.3	979.4	946.4
Four Wheeler	91.0	68.0	952.0	892.0
Hot Rod	73.4	76.0	817.7	685.0
Motorcyclist	28.0	18.0	501.5	478.5
Motor Trend	77.0	80.6	823.5	721.8
Motorhome	81.1	79.1	931.4	995.5
Rider	20.4	24.5	433.5	517.4
Road & Track	102.5	107.4	1,107.7	1,070.4
Trailblazer	48.6	37.1	531.9	422.5
Trailer Life	100.9	101.9	1,152.6	1,214.1
Total Group	1,537.9	1,366.4	16,865.1	16,136.7
% change		12.6%		4.5%
— Boating & yachting —				
Boating	119.0	113.8	1,663.9	1,501.9
Chesapeake Bay	41.8	36.8	517.1	437.0
Cruising World	110.0	90.0	1,393.6	1,443.8
Lakeland Boating (11X)	—	—	716.1	629.2
Motor Boating & Sailing	147.5	132.9	1,780.2	1,841.7
Sail	80.4	103.5	1,176.7	1,240.8
Small Boat Journal(6X)	—	—	268.0	249.2
Trailer Boats(11X)	40.4	23.1	571.0	446.9
Western Boatman(6X)	30.0	31.0	216.1	226.3
Yachting	143.1	132.8	1,568.2	1,524.6
Total Group	712.1	663.8	9,870.9	9,541.3
% change		7.3%		3.5%
— Canadian —				
L'Actualite	123.5	134.0	903.8	932.6
Chatelaine:				
English Edition A.	133.9	105.9	928.6	1,020.8
French Edition	102.3	91.8	822.3	875.1
City & Country Home(10X)	71.0	67.9	554.8	550.6
Equinox	57.8	47.5	250.1	236.0
Flare A.	104.0	97.3	959.1	905.5
Macleans (52X) A.	213.0	248.0	1,307.1	1,464.8
Moneywise	55.9	46.3	370.7	390.9
Reader's Digest:				
Canadian-English A.	70.6	57.9	566.1	729.5
Canadian-French A.	61.0	52.5	433.3	606.4
Toronto Life	162.7	221.0	1,097.0	1,062.2
Vancouver	109.5	110.1	773.7	843.5
Total Group	1,265.2	1,280.2	8,966.5	9,618.0
% change		-1.2%		-6.8%
— Civic/fraternal —				
American Legion	34.8	26.7	375.2	273.7
Elks (10X)	20.6	22.2	196.2	187.9
Kiwanis	18.6	18.8	179.5	181.3
Lion (10X)	7.0	8.0	83.8	64.6
Rotarian	17.5	17.0	165.8	164.2
V.F.W. (11X)	33.4	31.5	320.0	286.6
Total Group	131.9	124.2	1,320.5	1,158.3
% change		6.2%		14.0%
— Comics —				
Archie Comics Group	5.0	3.0	69.0	43.0
DC Comics	7.0	4.5	71.0	58.5
Marvel Comics Group	9.0	8.0	98.5	78.0
Total Group	21.0	15.5	238.5	179.5
% change		35.5%		32.9%
— General —				
American Health (10X)	77.7	64.7	658.1	565.6
American Heritage (7X)	48.2	—	237.0	85.1
American West (6X)	28.7	33.0	213.2	234.2
The Atlantic A.	81.9	75.3	419.1	424.5
Bon Appetit A.	117.0	129.2	906.6	906.2
Changing Times	90.9	81.6	705.0	582.4
Conde Nast's Traveler	45.0	—	158.0	—
Connoisseur	142.4	135.4	893.2	817.2
Consumers Digest (6X)	32.1	23.3	145.3	173.2
Ebony	109.7	101.2	1,022.1	1,024.8
Fifty Plus	39.9	46.6	423.9	402.3
Food & Wine	100.7	91.7	657.2	597.0
Games (6X)	15.2	15.1	91.6	201.4
Golden Years	42.6	37.6	434.5	289.5
Gourmet	182.8	157.1	1,166.3	1,047.3
Harper's A.	33.1	23.9	336.1	247.3
Harrowsmith (6X)	46.0	38.0	289.0	237.0
Let's Live	46.0	56.0	503.0	547.0
Life	63.7	234.7	511.8	735.3
Mature Outlook	53.9	44.5	46.3	44.5
Modern Maturity (6X)	50.6	54.2	228.3	228.5
Money	165.8	155.8	1,417.5	1,344.8
Money Maker	8.0	—	36.8	—
Moneyworth (4X)	—	—	34.2	30.5
Mother Jones (9X)	—	—	118.9	136.1
National Geographic Traveler(4X)	—	—	117.0	106.2
Prevention	63.4	70.2	683.0	682.3
Psychology Today	41.0	40.2	333.0	328.9
Reader's Digest A.	174.9	133.8	1,061.0	1,057.2
Saturday Evening Post (9X)	36.4	40.5	325.8	306.7
Smithsonian	134.1	110.3	961.6	888.6
Sylvia Porter's Personal Finance (10X)	53.1	47.2	447.1	390.8
Town & Country	235.5	233.2	1,520.4	1,464.6
Travel-Holiday	45.2	45.9	576.2	478.3
Travel & Leisure	163.5	124.5	1,126.2	1,160.3
Vanity Fair	104.2	75.2	762.0	519.3
Writer's Digest	33.8	29.8	313.5	278.9
Yankee	104.7	107.4	894.5	859.0
Total Group	2,811.5	2,656.8	20,774.0	19,422.9
% change		5.8%		7.0%
— Home —				
Americana (6X)	19.0	15.4	126.7	151.8
Architectural Digest A.	232.2	207.0	1,449.7	1,419.7
Better Homes & Gardens	180.2	144.6	1,277.6	1,213.5
Colonial Homes (6X)	59.3	69.4	379.6	391.7
Columbus Monthly-Homes (4X)	—	—	121.1	105.4
Country Home (6X)	356.1	299.6	78.3	63.3
Country Living	108.0	86.7	984.1	814.1
Family Handyman (10X) A.	40.5	45.9	519.5	534.0
Flower & Garden (6X)	—	—	212.0	190.6
Home	59.6	47.4	579.6	545.4
Home Mechanics	60.4	51.3	646.0	636.7
The Homeowner (10X)	30.6	26.0	325.4	282.2
Horticulture	34.3	33.0	398.2	391.8
House Beautiful	97.1	84.2	811.1	793.4
House & Garden	134.3	137.3	1,069.4	1,068.8
Houston Home & Garden	59.8	82.7	769.1	822.6
Metropolis	62.2	54.8	585.6	385.0
Metropolitan Home	105.7	67.4	740.1	632.9
1,001 Home Ideas	65.0	56.9	576.9	511.7
Phoenix Home/Garden	124.8	65.7	833.8	761.5
Practical Homeowner	39.9	38.5	426.1	467.7
Rodale's Organic Gardening	31.2	41.5	519.0	604.8
South Florida Home/Garden	36.5	33.2	340.1	350.3
Southern Accents (6X)	100.9	105.5	601.0	596.7
Southern Living	164.9	171.0	1,348.4	1,545.8
Sunset Magazine A.	162.5	156.4	1,366.1	1,503.7
Workbench (6X)	54.1	43.1	281.7	279.6
Total Group	2,419.1	2,164.4	17,366.1	17,064.7
% change		11.8%		1.8%
— In-flight & other passenger —				
Alaska Airlines	54.9	60.0	599.7	643.8
America West Airlines	58.4	35.5	558.9	276.8
American Way (24X)	180.3	117.1	1,269.9	1,080.8
Brighton inflight Group:				
Continental	46.2	35.0	500.5	346.5
Hawaiian Air (6X)	17.8	—	100.8	—
East/West Network:				
Eastern Review	76.0	103.2	743.8	1,075.5
Northwest	53.8	58.3	522.5	513.2
PSA Magazine	83.3	134.3	913.3	1,025.9
Pan Am Clipper	71.7	44.0	502.8	484.5
Spirit	68.5	95.3	664.4	1,056.6
TWA Ambassador	63.3	64.2	558.7	108.5
Vis 'A Vis	85.8	116.2	669.6	1,058.0
Halsey Publications:				
Delta Sky	100.0	95.2	909.2	836.5
US Air	72.3	54.9	586.5	510.7
Piedmont Airlines' Pace	100.0	94.3	1,000.0	917.4
Spirit of Aloha (6X)	34.1	26.4	345.1	301.9
Total Group	1,166.5	1,133.9	10,445.7	10,236.6
% change		2.9%		2.0%
— Men's —				
Esquire A.	116.8	136.8	1,015.6	1,089.7
Firehouse Magazine	45.9	52.6	506.8	501.9
Gentlemen's Quarterly A.	198.7	182.2	1,741.3	1,749.7
M Magazine	74.8	71.8	832.2	698.9
Muscle & Fitness	131.0	111.3	1,368.4	1,211.1
Penthouse A.	40.3	33.9	447.0	406.3
Playboy A.	72.8	61.8	601.2	659.7
Salute (8X)	34.7	25.6	215.9	116.6
Total Group	715.0	676.2	6,728.3	6,433.8
% change		5.7%		4.6%
— Metropolitan —				
Aloha (6X)	35.8	33.2	187.2	180.3
Atlanta	81.3	61.5	673.3	586.1
Baltimore	111.9	104.4	860.9	882.1
Boston	211.9	217.9	1,818.3	1,745.0
California	57.9	74.2	677.5	703.1
Chicago	143.6	180.1	1,180.7	1,485.9
Chicago's North Shore	108.1	112.2	950.6	928.2
Cincinnati	71.1	88.2	702.6	721.5
Cleveland	62.5	85.0	749.6	783.3
Coast (39X)	51.4	60.7	2,028.7	2,340.6
Columbus Monthly	76.5	84.2	802.4	780.2
Connecticut	109.7	89.8	1,109.6	1,035.9
D/Magazine, Dallas/Ft. Worth	136.1	130.2	1,232.9	1,341.4
Denver	40.2	40.8	401.0	397.7
Detroit Monthly	197.0	144.4	974.5	880.9
Grand Rapids	56.7	52.3	472.9	444.6
Gulfshore Life (10X)	76.2	75.0	766.0	676.0
Honolulu	191.4	105.6	798.8	707.3
Louisiana Life (6X)	41.7	57.0	238.0	248.9
Madison	61.9	68.0	692.9	667.6
Memphis	85.0	86.5	889.0	821.5
Metropolitan Detroit	158.0	98.5	824.1	841.5
Miami/South Florida	110.7	74.9	634.8	712.4
Mid Atlantic Country	35.1	31.0	383.7	438.2
Milwaukee	83.8	86.0	688.4	733.6
Minneapolis/St. Paul	129.2	135.6	1,155.8	1,105.5
New England Monthly	60.8	54.1	501.0	435.4
New Jersey Monthly	103.9	91.5	1,046.2	884.2
Ohio	70.4	63.2	678.6	680.1
Oregon (6X)	—	—	232.0	—
Orlando	83.0	103.0	1,025.5	1,067.0
Palm Beach Life	83.1	90.8	683.5	658.6
Palm Springs Life	107.0	114.9	1,252.8	1,210.7
Philadelphia	191.4	173.7	1,669.2	1,492.4
Phoenix	72.1	174.2	730.6	1,065.0
Pittsburgh	91.0	92.5	765.2	746.5
St. Louis	61.9	61.1	605.9	543.0
San Diego	185.7	158.6	1,553.0	1,500.0
San Francisco Focus	159.9	126.6	1,119.7	1,059.8
Texas Monthly	135.8	155.8	1,103.9	1,349.7
Twin Cities	79.3	77.3	777.4	618.3
The Virginian (6X)	62.5	53.3	361.1	347.8
Washington (7X)	67.0	62.5	367.0	373.5
The Washingtonian	268.5	210.0	1,752.3	1,703.9
Total Group	4,408.0	4,240.3	38,118.7	37,925.4
% change		4.0%		0.5%
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	28.6	27.5	275.6	242.8
Secrets	28.6	27.5	275.6	242.8
True Confessions	28.6	27.5	275.6	242.8
True Experience	28.6	27.5	275.6	242.8
True Love	28.6	27.5	275.6	242.8
True Romance	28.6	27.5	275.6	242.8
Sterling Women's Group:				
Daytime TV	25.8	25.5	273.2	280.7
Modern Screen (6X)	—	—	73.5	79.2
Movie Mirror (6X)	—	—	14.5	18.5
Soap Opera Stars (6X)	—	—	82.5	78.6
TV Movie Screen (6X)	—	—	38.5	42.8
TV Picture Life (6X)	5.0	—	34.3	14.2
Total Group	202.2	190.3	2,170.0	1,971.0
% change		6.2%		10.1%
— Music/entertainment —				
Audio	109.5	98.0	1,118.6	1,043.6
Dance Magazine	51.1	50.2	519.4	452.5
Playbill	56.9	59.5	504.4	505.3
Stereo Review	123.4	120.7	848.6	812.9
Video Magazine	76.3	86.0	755.6	817.0
Total Group	417.2	414.4	3,746.5	3,631.3
% change		0.7%		3.2%
— National Sunday magazines —				
Parade (52X)	59.3	67.4	558.8	595.1
Total Group	59.3	67.4	558.8	595.1
% change		-12.1%		-6.1%
— Outdoor & sport —				
Alaska	48.9	42.0	388.9	468.1
The American Handgunner (6X)	59.0	36.0	290.0	229.0
American Hunter	26.2	24.1	277.7	276.2
American Rifleman	23.3	25.6	245.8	236.5
Bass Master (10X) A.	41.3	56.5	584.3	497.5
Bicycling (9X)	—	47.6	817.6	686.9
Ducks Unlimited (6X)	40.6	44.6	217.5	210.6
Field & Stream	80.2	97.0	925.4	996.6
Fishing World (6X)	20.6	25.7	210.8	219.0
Florida Sportsman	93.1	91.3	1,281.3	1,155.7
Golf Digest	85.8	64.0	1,098.7	1,018.1
Golf Magazine	68.8	43.5	817.7	718.7
Gun Dog (6X)	59.0	42.7	242.2	218.0
Guns	49.0	38.0	375.0	350.0
Guns & Ammo	66.5	57.0	556.8	559.4
In-Fisherman (6X)	47.0	43.0	468.0	412.7
Outdoor Life	88.4	75.9	907.2	853.4
Outside Magazine	61.3	68.6	598.6	540.2
Petersen's Hunting	70.8	80.0	610.8	599.0
Runner's World (12X)	44.7	29.3	410.5	339.4
Salt Water Sportsman	78.1	61.3	1,118.6	950.1
Sierra (6X)	46.0	43.0	241.4	256.4
Shooting Times	38.3	41.2	418.8	413.8
Ski (8X) A.	168.3	144.9	793.5	697.1
Skiing (7X) A.	213.0	221.0	831.3	743.6
Skin Diver	106.9	94.1	1,147.8	1,014.8
Southern Outdoors (9X)	50.8	57.8	275.2	398.2
Southern Outdoors Saltwater(8X)	—	—	224.4	—
Sport	43.0	49.3	445.2	415.2
Sports Afield	50.0	63.0	902.6	784.8
Tennis	66.2	55.8	800.6	784.3
Waterski (8X)	48.3	48.3	493.6	395.5
Western Outdoors (10X)	31.5	31.8	414.5	434.7
Wildfowl (6X)	—	—	90.2	77.8
Wing & Shot (6X)	24.5	17.9	99.4	27.9
World Tennis	58.4	18.0	400.9	318.4
Total Group	2,098.2	1,978.7	20,022.9	18,297.2
% change		6.0%		9.4%
— Photography —				
American Photographer	—	—	—	—

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

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NOVEMBER

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
Petersen's Photographic	44.2	31.1	314.5	284.1
Popular Photography	105.3	81.5	779.5	661.1
Total Group	**149.5**	**112.6**	**1,094.0**	**945.2**
% change		32.8%		15.7%
— Religious —				
Charisma	61.3	54.1	572.0	564.4
Christian Herald (11X)	25.5	28.2	276.4	280.9
Christianity Today (18X)	72.5	69.5	517.9	505.4
Ministries Today (6X)	36.0	43.8	234.7	256.5
Moody Monthly	54.8	49.0	355.3	426.8
Our Sunday Visitor (52X)	18.9	15.1	158.3	126.6
Today's Christian Woman (6X)	39.7	58.0	229.9	203.3
Total Group	**308.7**	**317.8**	**2,344.5**	**2,363.9**
% change		-2.9%		-0.8%
— Science/electronic /mechanic —				
Discover	49.6	59.9	485.0	383.8
Family & Home Office Computing	60.6	63.5	469.9	476.5
Omni	86.7	80.8	671.2	651.5
Personal Computing	267.1	133.2	1,913.9	1,374.6
Popular Mechanics	90.8	89.7	923.6	1,010.9
Popular Science	89.7	68.7	777.5	741.0
Scientific American	72.9	56.3	496.0	391.6
Spectrum	77.7	90.3	725.7	913.6
Total Group	**795.0**	**642.4**	**6,462.8**	**5,943.3**
% change		23.8%		8.7%
— Woman/fashion/service —				
Bride's Magazine (6X) A.	—	—	2,097.8	1,775.4
Cosmopolitan A.	257.1	233.7	2,238.3	2,274.8
Essence	83.7	87.2	854.0	891.0
Family Circle (17X) A.	137.4	147.3	1,455.4	1,592.6
Glamour	212.0	201.8	2,087.6	2,008.6
Good Housekeeping A.	172.6	218.5	1,547.8	1,780.2
Harper's Bazaar	165.5	167.0	1,512.4	1,597.6
Health	50.0	49.2	522.2	446.6
Ladies' Home Journal	147.9	145.5	1,159.1	1,233.3
Mademoiselle	184.0	165.6	1,668.4	1,496.4
McCall's	124.1	123.4	1,043.3	1,032.6
Military Lifestyle	68.6	69.2	509.7	522.2
Modern Bride (6X)	177.0	185.7	1,721.5	1,534.7
Ms.	42.5	41.2	473.9	432.9
New Woman	80.4	81.3	887.1	811.3
Parents Magazine A.	176.7	148.9	1,250.5	1,104.3
Redbook	121.9	137.9	1,120.1	1,066.6
Savvy	40.3	44.0	350.8	327.4
Self	132.9	152.2	1,133.8	1,094.5
Seventeen	122.0	116.3	1,378.8	1,295.4
Shape	73.1	67.5	805.5	791.9
Soap Opera Digest (26X)	17.6	19.9	210.6	200.9
Teen Magazine	59.7	45.7	658.9	576.7
True Story A.	61.1	56.6	546.4	529.9
Vogue	306.5	330.2	3,078.9	2,989.9
W Magazine	156.4	119.2	1,425.1	1,287.4
Woman (9X)	40.0	—	290.0	161.5
Weight Watchers	32.5	38.2	350.3	372.8
Woman's Day (16X) A.	163.8	148.6	1,554.9	1,504.4
Women's Sports & Fitness	—	—	—	—
Workbasket	37.7	34.5	328.4	350.1
Working Mother	129.1	123.6	918.7	834.7
Working Woman	141.0	194.5	1,075.9	1,207.8
Total Group	**3,715.0**	**3,694.1**	**36,256.0**	**35,126.6**
% change		0.6%		3.2%
— Youth —				
Boys' Life	22.7	16.0	190.3	180.9
Campus Life (10X)	41.3	41.0	413.3	396.7
Total Group	**64.0**	**57.0**	**603.5**	**577.6**
% change		12.2%		4.5%

OCTOBER

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
— Business/national —				
Barron's	248.1	215.4	2,114.3	1,873.4
Black Enterprise	70.9	66.8	696.9	728.8
Business Week (52X) A.	596.3	395.8	3,588.4	3,072.2
Business Month	—	—	—	—
Financial World (26X)	56.5	47.6	593.6	548.4
Forbes (26X)	504.5	459.1	2,867.7	2,708.0
Fortune (26X)	467.8	362.1	2,469.3	2,307.3
Frequent Flyer	60.0	67.2	576.3	605.4
Futures	98.2	46.3	615.7	486.3
Inc. Magazine A.	—	—	—	—
Income Opportunities	93.1	65.7	687.1	535.5
Industry Week (25X) A.	91.6	102.9	803.4	949.7
Nation's Business (12X) A.	46.2	41.6	334.7	342.3
Personal Investor (6X)	—	—	—	—
Venture	76.5	82.4	642.4	695.5
Total Group	**2,409.7**	**1,953.0**	**15,989.7**	**14,852.8**
% change		23.4%		7.7%
— Business/regional —				
Advantage-Nashville's Bus. Mo.	—	—	—	—
Arizona Bus. Gazette (52X)	57.1	40.6	379.3	324.8
Baltimore Bus. Journal	106.0	92.8	889.1	665.4
Boston Bus. Journal (52X)	142.6	141.7	1,392.8	1,334.0
Business Atlanta	94.8	114.5	641.9	688.4
Business First of Buffalo	—	—	—	—
Business First of Columbus	151.3	81.2	1,100.4	826.2
Business Journal-Milwaukee	132.0	128.5	1,271.0	1,057.1
Business Journal-Sacramento	60.1	66.7	658.7	473.6
Business North Carolina	50.5	49.3	453.5	433.5
Capital Dist. Bus. Review (52X)	78.7	—	793.7	—
Cincinnati Business Courier	128.5	113.6	1,111.6	800.1
Corporate Report Kansas City	27.4	31.2	235.2	275.3
Corporate Report Minnesota	79.0	78.0	758.0	788.0
Crain's Chicago Bus. (52X)	212.1	182.8	1,517.8	1,636.0
Crain's Cleveland Bus. (52X)	81.1	101.4	634.0	648.8
Crain's Detroit Bus. (52X)	94.4	97.3	782.0	655.4
Crain's New York Bus. (52X)	62.8	59.2	390.2	358.9
Florida Trend (13X)	—	—	—	—
Georgia Trend	71.7	69.1	676.9	546.7
Grand Rapids Bus. Journal	47.1	33.9	469.0	357.3
Hawaii Business	38.5	43.5	463.6	470.4
Houston Bus. Journal (52X)	88.8	62.8	692.0	832.0
Indianapolis Bus. Journal (52X)	—	—	—	—
Kansas City Bus. Journal	—	—	—	—
Los Angeles Bus. Journal(55X)	90.1	47.9	787.7	362.3
Manhattan Inc.	98.2	94.2	749.4	705.0
New England Bus. (20X) A.	57.8	108.4	634.6	811.3
New Orleans City Business	—	—	—	—
Pacific Bus. News (52X)	111.3	111.0	1,159.3	1,172.7
Philadelphia Bus. Journal (52X)	172.9	155.0	1,385.7	1,274.4
Pittsburgh Bus. Times (52X)	140.3	124.6	1,233.9	1,102.8
Providence Business News	75.0	43.0	693.7	235.2
Regardie's/Washington	174.0	167.0	1,442.0	1,289.0
San Diego Bus. Journal (52X)	36.8	48.9	321.5	351.5
San Jose Bus. Journal	—	—	—	—
South Florida Bus. Journal	91.5	91.3	1,032.9	1,121.3
St. Louis Bus. Journal (52X)	148.4	143.0	1,289.6	1,395.8
Texas Business	40.3	56.3	344.3	573.1
Warfields Monthly Baltimore	75.7	394.4	664.6	78.6
Total Group	**3,116.7**	**3,173.0**	**27,050.0**	**23,644.8**
% change		-1.8%		14.4%
— National Sunday magazines —				
Parade (52X)	53.3	60.9	499.5	527.7
USA Weekend (52X)	41.2	48.0	391.7	497.5
Total Group	**94.5**	**108.9**	**891.2**	**1,025.2**
% change		-13.2%		-13.1%
— Newspaper Sunday magazines —				
Boston Globe	186.4	195.5	1,809.2	1,824.1
Chicago Tribune	166.9	89.6	1,091.9	871.9
Cleveland Plain Dealer	76.9	66.0	621.7	535.8
Columbus Dispatch	23.9	78.6	339.5	432.4
Detroit News	87.0	78.0	713.0	753.0
L.A. Times	77.5	68.2	609.1	677.3
Louisville Courier-Journal	52.0	67.0	528.0	599.0
Miami Herald	51.0	75.2	375.0	465.2
New York Times Magazine	411.1	421.6	3,314.0	3,286.7
Philadelphia Inquirer	120.7	73.5	755.7	660.5
Seattle Times	100.0	89.0	620.0	593.0
St. Louis Post Dispatch	87.3	54.1	731.3	561.4
Toledo Blade Magazine	34.6	38.1	388.1	452.7
Washington Post	136.1	154.6	1,247.9	1,260.2
Total Group	**1,611.4**	**1,549.0**	**13,144.4**	**12,973.2**
% change		4.0%		1.3%
— Weeklies/bi-weeklies —				
The Advocate (26X)	130.8	107.7	1,371.3	1,279.3
Army Times Military Group:				
Air Force Times (52X)	180.3	172.1	1,648.7	1,764.5
Army Times (52X)	177.0	163.5	1,604.4	1,654.9
Navy Times (52X)	196.7	189.0	1,790.5	1,852.6
The Blood-Horse (52X)	267.3	467.6	3,313.3	3,788.4
Capper's (26X)	19.2	33.7	265.2	274.1
Commonweal (22X)	6.6	9.7	76.1	66.3
Golf World (43X)	79.5	35.3	970.5	823.4
Grit (52X) A.	28.0	28.9	271.3	246.7
National Journal (50X)	110.3	99.8	665.8	591.4
National Review (25X)	—	—	—	—
New Republic (48X)	56.3	41.5	399.5	354.0
New York Magazine (50X)	320.3	291.9	2,457.5	2,445.1
New Yorker	292.5	322.5	1,895.0	2,036.9
Newsweek (52X) A.	275.9	266.0	2,039.0	1,972.4
People (52X)	316.9	302.7	2,759.8	2,910.8
Rolling Stone (25X)	132.1	144.9	1,335.6	1,110.4
Sporting News (52X)	63.3	51.2	522.5	507.3
Sports Illustrated (52X) A.	264.5	248.5	2,099.8	2,165.3
Time (52X) A.	242.8	275.1	1,869.7	2,035.8
Travelhost (52X) C.	3,518.5	3,195.0	32,064.0	32,200.0
TV Guide (52X) A.	394.3	311.5	3,039.0	2,869.4
TV Update (52X) C.	—	—	—	—
Us Magazine (26X)	51.6	44.3	463.9	401.6
U.S. News & World Report (52X) A.	167.3	129.2	1,274.8	1,247.3
Total Group	**7,291.9**	**6,931.7**	**64,197.3**	**64,597.9**
% change		5.2%		-0.6%
— Foreign —				
Business Week Int'l (52X)	201.7	164.0	1,188.1	1,304.2
De Armas Publications:				
Geomundo:				
Argentina	7.0	4.0	38.0	15.0
Central America	9.0	6.0	61.0	40.0
Chile	6.0	7.0	47.0	45.0
Colombia	14.0	14.0	126.5	82.8
Ecuador	7.5	7.0	55.5	36.0
Mexico	8.7	14.0	82.2	88.2
Peru	5.0	5.0	49.0	30.0
Puerto Rico	8.0	3.0	56.0	28.5
U.S.	7.0	5.7	45.7	48.3
Venezuela	21.5	10.5	174.5	126.5
Hombre De Mundo:				
Central America	9.0	5.0	57.0	49.3
Chile	8.0	4.0	54.0	49.3
Colombia	32.0	16.0	138.3	142.0
Ecuador	7.0	4.0	50.0	42.3
Mexico	25.0	31.7	107.0	161.7
Peru	4.0	3.0	34.0	29.3
Puerto Rico	9.5	3.0	61.5	40.3
U.S.	8.3	14.0	124.5	98.7
Venezuela	26.5	16.5	174.0	180.8
Ideas Para Su Hogar:				
Argentina	4.0	6.3	21.7	18.2
Colombia	16.2	21.0	123.8	113.2
Ecuador	3.0	4.0	24.5	21.0
Mexico	13.0	19.3	96.3	85.8
Peru	2.0	2.0	53.5	29.0
Puerto Rico	—	—	—	0.2
U.S.	2.0	4.0	45.5	43.0
Venezuela	18.5	5.0	111.5	86.7
Mecanica Popular:				
Argentina	12.3	7.7	78.8	47.3
Central America	12.7	12.3	89.7	88.3
Chile	7.7	7.0	46.3	45.3
Colombia	23.0	22.3	184.7	151.3
Mexico	27.0	23.7	181.7	124.0
Peru	15.3	14.8	128.2	111.7
Puerto Rico	10.3	10.0	75.5	67.5
U.S.	3.2	5.2	39.2	57.7
Venezuela	18.3	22.0	144.0	116.2
Vanidades Continental:				
Argentina	13.2	3.0	155.5	76.8
Central America	32.3	20.0	180.7	172.3
Chile	6.7	5.7	50.8	40.7
Colombia	122.2	129.8	718.5	799.3
Ecuador	16.0	23.5	172.5	187.2
Mexico	104.0	99.5	757.3	776.0
Peru	29.3	15.8	206.2	153.8
Puerto Rico	35.7	34.8	343.7	309.3
U.S.	52.5	54.2	476.7	441.0
Venezuela	70.7	56.5	424.7	384.0
Hearst International:				
Buenhogar:				
Central America	5.0	3.0	12.0	13.0
Chile	3.0	2.0	11.0	13.0
Colombia	53.7	48.3	327.5	324.3
Ecuador	8.0	13.5	94.0	111.0
Mexico	55.8	70.5	325.5	335.0
Peru	22.0	23.5	133.5	94.0
Puerto Rico	16.2	12.5	53.0	92.5
U.S.	11.3	19.7	185.3	200.2
Venezuela	63.5	45.2	259.5	211.0
Cosmopolitan en Espanol:				
Central America	17.3	13.0	63.8	46.7
Colombia	45.8	35.3	201.8	161.3
Ecuador	2.0	2.0	20.0	2.0
Mexico	66.3	65.8	410.3	410.7
Peru	3.0	1.0	6.0	1.0
Puerto Rico	23.3	13.0	146.5	104.3
U.S.(Spanish language)	20.0	24.7	241.7	248.7
Venezuela	34.8	28.3	184.3	147.0
Cosmopolitan Foreign:				
Australia	94.0	92.4	606.6	660.3
Brazil	67.0	81.9	614.6	637.6
China	58.0	55.2	442.0	429.9
France	117.0	154.2	996.6	904.8
Germany	170.0	167.2	1,216.5	1,067.9
Great Britain	162.0	148.0	1,071.0	1,100.5
Greece	52.0	52.0	383.0	402.0
Holland	113.0	114.0	664.0	695.0
Italy	98.3	103.3	729.5	657.7
Japan	51.9	53.9	478.0	482.3
South Africa	97.0	113.0	726.0	785.0
Good Housekeeping Foreign Editions:				
Australia	51.0	53.0	352.9	360.7
Great Britain	190.9	182.4	1,311.0	1,247.7
International Management:				
English	71.5	56.2	323.3	418.7
Middle East	12.3	16.2	61.3	113.2
Johnston International:				
Alam Attijarat	21.8	30.7	231.3	332.4
Far East Business	27.7	58.5	260.1	384.5
Modern Africa (6X)	—	—	64.0	102.8
Latin America Finance (6X)	—	—	93.1	92.5
Newsweek International A.:				
Atlantic (52X)	138.4	125.4	759.4	794.5
Latin America (52X)	33.1	35.4	249.6	295.1
Asia (52X)	67.9	75.6	503.4	571.0
Progreso (9X)	9.3	7.6	49.8	71.6
Reader's Digest:				
Arabic	7.5	9.5	79.5	70.5
Asian	192.0	239.0	1,554.0	2,040.5
Australian	46.0	52.0	466.5	548.8
Belgian-Flemish	84.0	98.0	479.0	677.6
Belgian-French	48.0	52.0	318.5	395.1
British	81.8	75.0	493.0	471.1
Chinese B.	121.0	133.0	896.9	1,021.8
Danish	43.0	45.5	294.8	321.9
Dutch	69.8	68.8	378.4	377.4
Finnish	42.5	48.3	436.5	445.9
French	34.5	34.3	249.5	151.7
German	118.2	88.5	730.2	611.4
Iberian	—	5.0	2.0	17.5
Indian-English	83.0	94.5	707.0	698.0
Indian-Hindi	5.0	20.0	113.0	97.0
Italian	67.0	45.0	460.5	330.0
Korean	26.0	22.5	343.1	255.8
Latin American:				
Argentina	24.0	21.5	125.0	132.5
Brazil	—	—	—	18.0
Central American	4.0	10.0	39.0	70.0
Chile	22.0	26.0	116.0	126.0
Colombia	38.0	27.0	258.0	210.0
Ecuador	4.0	9.0	28.0	61.0
Mexico	75.9	84.1	592.1	566.5
Peru	3.0	10.0	34.0	72.0
Puerto Rico	2.0	3.0	32.0	45.5
U.P.B.	3.0	10.0	31.5	62.0
U.S. Spanish	8.5	11.0	89.0	156.5
Venezuela	3.0	8.5	35.0	63.0
New Zealand	51.3	68.0	480.3	549.3
Norwegian	25.8	8.5	162.6	73.0
Portugal	52.0	39.0	393.5	380.0
South African	112.5	106.0	733.0	782.5
Swedish	8.0	15.5	68.0	130.5
Swiss-French	41.0	32.0	235.5	218.3
Swiss-German	65.0	39.0	335.0	278.0
Time International:				
Time-Asia	109.9	84.8	545.1	679.2
Time-Atlantic	161.2	138.8	849.2	924.9
Time-Canada	216.9	235.4	1,454.6	1,716.2
Time-Latin America	43.0	43.1	311.4	426.8
Viaoo (52X)	148.2	229.0	1,083.7	1,408.7
Vision/Latin America (24X) A.	40.0	39.8	259.6	273.7
Total Group	**5,592.5**	**5,593.8**	**38,813.2**	**40,263.9**
% change		0.0%		-3.6%

How to join the ad world

Students learn the right pitch to land a job in tight market

An Advertising Age roundup

Between agency mergers, huge account shifts and economic turmoil, the jobs get fewer and the jobless get tougher.

With increasing numbers of agency veterans competing for jobs, the prospect for students of advertising dims.

The job market is the tightest it has ever been, said Richard Wilde, media arts department chairman of the School of Visual Arts, New York.

"Students sense that something's up, that the business is going through a transition," said Gerry Contreras, communications design department chairman and professor, Pratt Institute, New York.

The industry mergers have "affected even the entry-level jobs. They are simply harder to get because there are fewer of them," Mr. Wilde said.

Even with entry-level positions, agencies "want people with training," said Sumner Wyman, instructor of the InterAd course at American Graduate School of International Management, Glendale, Ariz., and president of Scottsdale-based Wyman Associates, a marketing consultancy. "Agencies do not want neophytes."

To compete for those jobs, students are looking carefully at how they will market themselves.

"My teachers have stressed over and over that we have to position ourselves, that we have to use creative strategies and targeted self-promotion," said Tom Lunt, a copywriting student at the Portfolio Center, Atlanta.

Portfolio Center students have "done a lot of research about where we'd like to work. We look at not just the agency structure but also at the types of products they work with, then position ourselves to them," Mr. Lunt said.

Portfolios

The students' biggest tool in selling themselves is their portfolios.

Most of the homework assignments at the Portfolio Center are designed to spice up a student's portfolio, said Norm Grey, creative director of Gillis, Townsend, Bowes, Hanlon and a Portfolio Center instructor. "We try really hard to avoid a cookie-cutter portfolio.

"When people come in for a job interview, so many of their portfolios look alike. . . . I have my students go pick out store brands that aren't advertised . . . and have them do ads and TV commercials for it."

The School of Visual Arts places greater emphasis on campaigns in portfolios instead of just single ads.

Problems arise when students develop portfolios based not on their own personalities, but on what they believe will get them a job, said Bryan Birch, instructor at the Art Center College of Design, Pasadena, Calif., and senior VP-creative director for BBDO Worldwide, Los Angeles. "Chances are, if an agency does not like your portfolio, it won't like you."

Rather, he tells students to find ads they like. "They will discover that all of those ads were probably created by two or three agencies" and should apply at those shops, he said.

David Brickley, a recent Art Center graduate, did just that. He developed a self-promotion piece that eventually landed him the position of free-lance art director with San Francisco-based Hal Riney & Partners. The mailer featured a large photograph of a rough-looking biker holding a baby. It was headlined "Boy here needs a job." Mr. Brickley said Riney was looking for "someone who could think."

Agency exposure

Teachers advise students to get as much exposure to agencies as possible, including portfolio reviews attended by agency executives and interviewing. Most of the schools employ agency executives to teach classes; some even hold classes in their shops' offices.

Many of Pratt's 44 faculty members are from New York ad agencies, Mr. Contreras said. The 100 faculty members at the School of Visual Arts represent such agencies as DDB Needham Worldwide; Della Femina, Travisano & Partners; and Scali, McCabe, Sloves. Portfolio Center instructors all work full time in the ad business.

Carole Jankowski, a copywriter at Young & Rubicam, and Art Harris, an art director there, gave their Pratt class a project that gave the professionals trouble, a campaign for a Johnson & Johnson sunblock lotion endorsed by pediatricians.

It takes imagination to sell yourself to ad agencies these days—especially if you're fresh out of school. David Brickley, a graduate from the Art Center College of Design, Pasadena, Calif., used this piece to land a job with Hal Riney & Partners, San Francisco.

"It was a challenging kind of real scenario. You got to question, 'Can I cut it in the real world?' " said Maureen Volpe, a student in the class.

Some schools simulate not only professional advertising experience but also agency structure. In American Graduate School's InterAd course, four teams of six students become mock agencies and develop an international advertising and marketing campaign for a client.

To give his students the edge, Mr. Wilde of the School of Visual Arts schedules a portfolio review and luncheon a week after commencement for his graduates, 50 top art directors and personnel from the best agencies.

"I've started the networking [for the students] to meet these people and to get criticism and a sense of the real world," Mr. Wilde said.

The Portfolio Center also hosts a review for its students. In addition, the students face a quarterly critique in which a panel must approve their work before they can sign up for the next quarter.

Job interviewing also gives students exposure to agencies.

One of American Graduate School's recent alumni, David Burnett, an assistant account executive at Grey Direct, New York, found interviewing to be an encouraging experience.

"Even if the interviewer did not have a position available in his area, if he liked you he would try to get you into the organization through another channel," he said.

Smaller agencies, markets

Because larger markets are especially crowded with experienced professionals, some students are looking to smaller markets and lower-profile shops to break into the industry.

"Five years ago students were totally geared to the Top 15 to 20 consumer advertising agencies; now they are open to any agency," said the School of Visual Arts' Mr. Wilde.

Any agency in New York, that is. The industry "is seeing marvelous stuff from Minneapolis, Texas, etc., but my gut feeling is . . . New York is still the capital of advertising," and students want to stay there, he said.

Boutique agencies are "absolutely a viable alternative if [students] do a tutelage with a top principal," Mr. Wilde said.

Kevin Brown, who is majoring in art direction and graphic design at Pratt, last summer landed a job in a small graphics design company, learning the basics from the company's president. But his main interest is advertising, and his goal is to land a job with an agency in the U.S. or abroad.

Mr. Brown sees one advantage to a smaller agency. "The largest agencies are restricted a lot more—they're not as free to do advertising that's experimental. They're restricted by their clients," he said.

Related fields

Another option for students unable to crack the advertising industry is to pursue a job in a related field. For example, Portfolio Center students are advised to look for jobs at design studios, direct-marketing companies, in-house client departments and other advertising-related companies.

While most of the advertising students at the School of Visual Arts are not looking to related fields, graphic design majors are targeting those areas, Mr. Wilde said. His advertising students still are "interested in the science of persuasion, not just promotion."

Another valuable asset is internship. Students at the School of Visual Arts are given a chance to intern at a major agency. Of 60 seniors, 20 are chosen. One-third of the 20 eventually are hired by the agency, Mr. Wilde said. If the students are not paid, they get class credit.

Despite the tightened job market, students remain optimistic.

"I tell my students, 'Don't get panicky, there is always room at the bottom,' " said American Graduate School's Mr. Wyman.

The Art Center's Mr. Birch agreed. "Agencies are looking for sparks wherever they can find them."#

Betsy Spethmann in Chicago wrote this story from reports by Laura Loro in Philadelphia; Jo Beth McDaniel in Atlanta; and Marie Spadoni in Phoenix, Ariz.

Agency layoffs

(Continued from Page 3)

production divisions.

Many of the agencies posting job declines in 1987 also spent 1986 reducing their staffs.

JWT Group, before its takeover this year by WPP Group, pared jobs in 1986 at its J. Walter Thompson USA unit to shore up profits.

For three merger-created agencies—Bozell, Jacobs, Kenyon & Eckhardt; DDB Needham Worldwide; and DMB&B—1987 also shapes up as a second straight year of staff cutbacks.

During 1986, newly formed DDB Needham, created by the merger of Doyle Dane Bernbach and Needham Harper Worldwide, reduced staff by 325; JWT cut by 126; Saatchi & Saatchi Compton—before its merger with DFS Dorland Worldwide—by 106; DMB&B by 79; and Ogilvy & Mather U.S. by 70.

And if the plunging stock market leads into a recession, a third year of belt tightening probably is in store, many sources believe.

The ebb and flow in job counts among these agencies partially reflects won and lost business.

After winning the $100 million U.S. Army recruiting account this year, Young & Rubicam added about 200 jobs to its staff to service it.

At J. Walter Thompson USA, about 100 jobs disappeared when the $200 million Burger King Corp. account was lost to N W Ayer.

Staff consolidations and agency spin-offs also have accelerated the downward trend in job counts at the top agencies.

Agency managements also are caught in a vise between shareholders' desire for stable and improving profits and client demands for more efficient, less costly services. That has focused more attention on staffing.

Outside the 10 largest U.S. agency employers, the agencies ranked No. 12 and No. 13 in U.S. advertising employment also reported staff declines thus far in 1987.

BBDO Worldwide said that, as of August, it had 1,546 jobs in advertising-related work, down 7.3% from the beginning of the year. Backer Spielvogel Bates, created by the merger this year of Ted Bates Worldwide and Backer & Spielvogel, said its U.S. advertising employment as of Oct. 1 was 1,227, off 2.2% from the beginning of the year.

The No. 11 U.S. agency employer, McCann-Erickson Worldwide, reported its job count was 1,666 on Oct. 1, up only slightly from the 1,661 reported last Jan. 1. Staff numbers had risen by nearly 100 in '86.#

Richard L. Gordon and Gary Levin in Chicago contributed to this story.

Layers

(Continued from Page 3)

of a pyramid, Mr. Bloom envisions an organization in the shape of an hourglass. Positions could be eliminated through attrition, layoffs or reassignments.

"We want to provide more senior time to our clients," he said. "The idea is to cut out layers in the middle, like having five people with note pads looking at a rough cut because the client used to have those layers.

"We are trying to eliminate those layers of approval. You get people who really make a contribution."

Mr. Bloom said he could not offer a formula as to which positions would be eliminated. In some cases it might be a management supervisor and in others the title might be account supervisor, he said.

Agency executives agreed that not all accounts can be handled in this way. Large package-good companies—whose brand management approach helped create the layers—may need agencies with a broad tier of middle management.

They noted, however, that many agencies grew to match client growth. The layers came about because elevating titles became a way of keeping staffers at an agency.

"You have to put titles aside and start to organize along job function lines," Mr. Lesser said.

Howard Davis, chairman-ceo of Dallas-based Tracy-Locke, said he believes agencies still are in for more than middle-management cutbacks.

"The story is not just middle management," he said. "It is more that the industry is paying attention to expense manifestation. Very few agencies are not affected. The good old days will never return. We must do more with less. Clients want senior people, and we have to ask whether or not we are getting value for every person on the payroll."#

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Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

TV commercials feature people dunking Fab 1 Shot to the tune of "Sweet Georgia Brown."

Fast break

New Colgate 'pouch' scores with consumers

By LAURIE FREEMAN and JON LAFAYETTE

Colgate-Palmolive Co.'s new "all-in-one pouch" laundry product is "flying" off store shelves even before the $35 million advertising blitz kicks into high gear this week.

Available at retail only a few weeks, Fab 1 Shot is getting a quick shot at creating—and leading—a new segment of the $3.25 billion laundry-detergent business.

"If these kinds of sales continue, we're going to have problems with out-of-stocks when they [Colgate] kick in" advertising, said a Midwestern retail executive. "Fab has been flying out of here," another retailer said.

Fab 1 Shot, a combination detergent, fabric softener and antistatic ingredient rolled national without test marketing (AA, Aug. 31), is aimed squarely at Procter & Gamble Co.'s similar Tide Multi-Action Sheets, now in test.

Although Colgate's TV spots broke Nov. 19, its marketing plan calls for a Nov. 27 "roadblock" buy of simultaneous commercials on all three major TV networks. Commercials, airing in 15, 30 and 60-second versions, will be supported by a national coupon drop Nov. 29.

Ariel Allen, VP-creative at New York-based Colgate, said the Fab 1 Shot campaign is the "largest

(Continued on Page 67)

JWT, Discover face uphill fight

Poor agency image

By JON LAFAYETTE

NEW YORK—J. Walter Thompson Co. plans to fight back from massive account losses by aggressively pushing for new business and shoring up its relationship with key clients, sources say.

JWT executives see that approach as the best chance to stem financial losses, boost its image and improve sagging morale among agency staffers.

The agency has lost $458.5 million in business and gained only $163.9 million that can be documented since London-based WPP Group said it would buy JWT Group last June *(see chart on Page 65)*.

Last week JWT's Chicago office lost the $42 million Sears, Roebuck & Co. Discover card account to DDB Needham Worldwide.

That loss came on the heels of other hefty losses, including the New York office's $20 million-to-$25 million Goodyear Tire & Rubber Co. account *(see story on Page 65)* and the $200 million Burger King

(Continued on Page 65)

Card use lagging

By LAURIE FREEMAN

The *real* market test for Sears, Roebuck & Co.'s Discover card is just dawning.

After two years of introductory ads proclaiming the "dawn of Discover," Sears and new agency DDB Needham Worldwide now must get people to use it.

DDB Needham, Chicago, handed the $42 million account last week, appears to face a tougher challenge than former agency J. Walter Thompson USA did in getting consumers to apply for the card.

Although more than 19 million Discover cards have been issued and more than 700,000 retail and service establishments accept it, consumers still are more likely to pull out their MasterCard, Visa or American Express card for major purchases.

The account review—in which Leo Burnett USA was the third participant—was decided on the basis of marketing strategies as much as creative presentation.

Sources said executives at Sears' Dean Witter Fi-

(Continued on Page 65)

Big issue for '88: Compensation

An Advertising Age roundup

Agency compensation looms as 1988's most significant and controversial issue for advertisers and agencies.

A festering problem for several years, compensation now threatens to overshadow creativity as the chief determinant in new-business reviews. Some agencies have turned down new accounts because of disagreements on this subject.

Whether straight commission, fee, commission-plus-fee or sliding-scale arrangements, new action is being taken on payment structures.

The changes have the potential to reshape the rules of the $100 billion-plus ad industry, some observers say.

Also, general economic conditions seem to be exacerbating the problem.

Greg Ostroff, analyst with Goldman, Sachs & Co., New York, said talk of an economic downturn next year has turned "low-key, low-level" discussions on compensation into "high-level, urgent discussions."

Since last year, the list of those arguing over compensation has grown to include some of the nation's top advertisers and agencies:

- Switzerland-based Nestle SA is asking its agencies to submit proposals on the compensation structure, with an eye to ending the company's commission-based system *(see stories on Pages 18 and 61)*. Carnation Co., a Nestle subsidiary, already cut its commissions by more than 10% this year, meaning its agencies are getting 12% or 13% instead of 15%.
- General Foods Corp. was rearranging its compensation structure until a companywide restructuring forced it to put those plans on hold *(see story on Page 60)*.
- Procter & Gamble Co., since acquiring Richardson-Vicks in 1985, has explored changing its compensation structure. Currently, R-V agencies are on a cost-plus-fee formula, while P&G agencies retain the 15% standard.
- Schering-Plough's Scholl USA recently selected DDB Needham Worldwide for its $7 million footwear account through a creative review. But when compensation discussions between the two broke down, DDB Needham bowed out and Della Femina, Travisano & Partners, a finalist in the re-

(Continued on Page 60)

Last Minute News

Rafting probe begins

KAMLOOPS, BRITISH COLUMBIA—Canadian officials have begun investigating the Aug. 1 rafting accident on the Chilko River in British Columbia that killed five U.S. advertising executives.

The investigation could raise important questions about liability involving business entertainment in advertising and other industries, as well as resolve troubling questions surrounding the accident. Those questions may end up the subject of lawsuits.

Coroner Robert Graham told ADVERTISING AGE he expects to issue in early December a "judgment of inquiry" detailing what happened. He also will make recommendations to the Canadian government on rafting procedures.

"We need to know whether the people in the raft were wearing life jackets, the proper head gear, following proper procedure on the river,

(Continued on Page 8)

Hot marketing ideas scarce this holiday retail season—Page 3

Inside: Second 100 Leading National Advertisers

Kidvid tumbles

People meters make ratings dive

By VERNE GAY and JULIE LIESSE ERICKSON

The Big 3 TV networks may owe advertisers an estimated $40 million worth of Saturday morning advertising time as a result of the switch to people meters.

That change in audience measurements has dropped ratings 25% to 30% for children's programming, sources said, leaving the networks with substantial audience shortfalls and "make-good" obligations in the $150 million daypart.

The situation is so serious, TV and agency sources report, that ABC-TV is threatening to program the daypart to appeal to teens, or abandon it altogether. ABC is the third-ranked network on Saturday morning and has seen its key demographic, 2-to-11-year-olds, plummet by 21%.

Most of the inventory paybacks are expected to come from ABC. Agency sources said CBS has emerged in the best shape as its total audience has grown recently after a slow start.

However, the nets as a group have seen children viewing levels drop 29% from the same period last year.

The $40 million in paybacks is expected to represent total losses for the entire broadcast year, extending from the fourth quarter of 1987 through August 1988.

Initial response from several key cereal and toy advertisers was that they recognize the problems of measuring children's viewership but that they also expect the networks to stick to their original agreements and compensate them for the shortfalls.

"We will not renege on our obligations," said Marv Goldsmith, senior VP-national sales for New York-based ABC, who added that the audience fall-off "is a big, huge problem."

The networks and A.C. Nielsen Co. have suggested

(Continued on Page 64)

Industry fumes as Florida pols stall on ad tax

By STEVEN W. COLFORD

The advertising industry's war with Florida over an ad tax threatens to flare up again.

What is rankling the three major ad industry associations, as well as media representatives, is the absence of any sign from state leaders that advertising will be exempted from the state's 5% tax on services during a special December session of the state Legislature.

That tax has been on the books since July 1, but intense opposition from the ad industry and others led Gov. Bob Martinez to ask the Legislature to repeal it.

The prospect of no relief this year from the tax "would be like inviting World War IV," said DeWitt Helm Jr., president of the Association of National Advertisers. "I don't know if there are any more meetings and media that can be canceled down there, but if there are . . ."

The passage of the tax bill triggered an all-out ad industry war in Florida, including canceled meetings and ad billings, which has hurt local TV and radio stations.

Already there is talk that Gov. Martinez and legislative leaders will not convene a special December session. An October special session that was to consider changes or repeal ended in chaos.

The lawmakers might wait until April's regularly scheduled legislative session to tackle problems created by the tax.

House Speaker John Mills and Senate President Jon Vogt said their current 13-city Florida tour, aimed at hearing what the public wants to do with the 5% tax, is turning up much support for the tax, especially from individual citizens.

Messrs. Mills and Vogt, both of whom want to amend the existing tax to exclude advertising, said they will not convene the special session until they are certain they have the votes to support them.

All the while, advertisers continue to pay to Florida its 5% tax that

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Highlights

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Century 21 Real Estate Corp. is boosting its fourth-quarter ad budget, as Prudential Insurance Co. of America enters the real estate brokerage business with a new subsidiary.

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The *Miami Herald* is updating its Spanish-language insert, renamed *El Nuevo Herald*.

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To reach "tweens," the National Dairy Promotion & Research is launching a $9.3 million TV campaign aimed at 9 to 15-year-olds.

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Actmedia, the $135 million POP company, reached agreement to buy rival Shelfvision.

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Earle Palmer Brown Cos. last week bought Spiro & Associates to strengthen its presence in Philadelphia.

62 Koch has advice for Uncle Sam
New York City Mayor Edward Koch thinks the federal government should underwrite TV commercials touting the benefits of buying products made in the U.S.A.

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Sears, Roebuck & Co.'s 10-year marketing contract with Walt Disney Co. indicates the retail giant's efforts to shift from mass merchandiser to specialty retailer.

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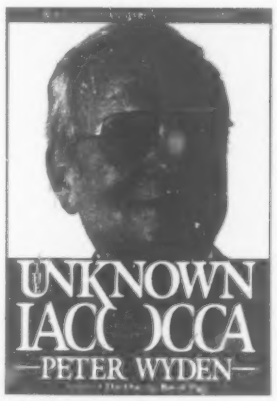
Advertisers are lining up to buy the first TV ad time available in Scandinavia as Denmark phases in the use of TV advertising on a new regional channel.

ATHENA winners. P. 50



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Studio snags DDB exec

Universal moving?

By WAYNE WALLEY

Universal Pictures last week hired DDB Needham Worldwide's Los Angeles general manager, and there is talk the $50 million account may follow him out the door.

Simon Kornblit, exec VP-general manager of the agency, becomes Universal's exec VP-marketing, overseeing all activities of the motion-picture marketing group.

Although Mr. Kornblit's shift could strengthen ties between Universal and DDB Needham, high-level executive changes at Hollywood studios often signal a review.

Mr. Kornblit, a 33-year veteran of DDB, said he has no plans to put the account up for review.

DDB Needham/West President Alan O. Pando said Bruce Miller, management supervisor on CIGNA Healthplan, will take over as management supervisor on Universal. No decision has been made on the general manager slot.

Mr. Pando said Mr. Kornblit's move will solidify the shop's relationship with the studio, based on Mr. Kornblit's long ties to both the agency and Mr. Pando.

Still, the move could open the door for other agencies to at least solicit the account.

D'Arcy Masius Benton & Bowles, Los Angeles, wants an entertainment industry account. And Managing Director Jim Helin has a previous working relationship with Mr. Kornblit at DDB. Also, Neil Lemlein, senior VP-director of DMB&B's entertainment group, worked for Mr. Kornblit at DDB. Then Mr. Lemlein subsequently moved to Universal, becoming Mr. Kornblit's client.

Other agencies likely to show interest in Universal are Ogilvy & Mather, which recently lost Columbia Pictures to McCann-Erickson, and Y&R Entertainment, which recently lost $90 million in billings from Walt Disney Co. to Western International Media.

DDB Needham has survived other management upheavals at Universal during its eight years as the studio's agency of record. Those upheavals include the September 1986 change when Thomas Pollock replaced Frank Price as chairman of the MCA Motion Picture Group (AA, Sept. 22, 1986).

Later that year, Edward Roginski replaced Marvin Antonowsky as marketing president.

Sources said Mr. Roginski initiated preliminary discussions with some agencies earlier this year and was considering a review until he became seriously ill.

Some sources speculated Universal convinced Mr. Kornblit to take the job because it wanted to change agencies without losing him.

Other personnel changes at DDB Needham could be significant; a string of senior-level people has left in recent months. The most visible departure was Robert Kuperman, the former exec VP-creative director who moved to Chiat/Day.#

Jennifer Pendleton in Los Angeles contributed to this story.

West Coast News

HBJ buyout boss eyes more

Edgell may add to 110 titles

By PATRICK McGEEHAN

An anticipated resurgence in U.S. heavy industry is prompting Robert Edgell, the leader of last week's $334.1 million management buyout of HBJ Publications, to consider launching new publications to serve that category.

"I think manufacturing is going to come back," Mr. Edgell said last week. But he did not elaborate on any specific plans the company might have for such a launch.

While guiding HBJ Publications from a small division of Harcourt Brace Jovanovich in 1970 to the nation's largest publisher of trade magazines with 110 titles, Mr. Edgell steered clear of publications related to what he calls "metal-bending" industries.

"I flunked drafting in high school, and I've never been interested in machinery," Mr. Edgell said, "so we assiduously avoided getting into those. I think it proved to be right."

Also, the steady decline of heavy manufacturing in the so-called Rust Belt states cut into ad revenues of other business publishers, while HBJ concentrated on service industries, such as healthcare, communications and travel and lodging.

The 65-year-old Mr. Edgell, who has headed the business publishing unit of Orlando, Fla.-based HBJ since 1970, said he had no plans to make other changes in the company, which will be called Edgell Communications Inc. He added he does not intend to sell any of the titles.

R. Edgell

"If I built it over 30-some years, I must like it," he said.

Nor will ECI follow in the footsteps of fellow trade publisher Cahners Publishing Co. and launch or acquire any consumer magazines, Mr. Edgell said.

Among the publications ECI acquired are *Beverage Industry, Hotel & Motel Management* and *Modern Medicine*. Along with the 110 titles, Mr. Edgell also acquired 23 trade shows owned by HBJ Publications and HBJ Beckley-Cardy, a school supplies company.

Mr. Edgell also said the new company probably would be looking to make more acquisitions in the first quarter of 1988.

New York investment banker Kidder, Peabody & Co., which provided a loan to help finance the deal, will be the majority owner of ECI. Labovitz Corp., an investment company in Duluth, Minn., and Wicks Communications, New York, also provided financing for what Mr. Edgell called the biggest transaction in trade press history.

The deal "looks pretty good" for the buyers, said J. Kendrick Noble, a media analyst with PaineWebber, New York.

He added that the pairing of the publishing and school supplies divisions is "rather an unusual combination," but the two should serve to balance each other because their businesses have different cycles.

The sale is expected to be completed by yearend.

ECI, which Mr. Edgell said will retain its 1,900 employees will be based in Cleveland.#

HIGH FLYERS

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MPA honors Grune

NEW YORK—The Magazine Publishers of America has named George V. Grune, chairman-ceo of The Reader's Digest Association, "1987 Publisher of the Year" and bestowed upon him the magazine industry's highest honor, the Henry Johnson Fisher Award.

G. Grune

"It's like the time Duke played Pitt—1950 if you care—and I returned a punt 41 yards for the game-winning touchdown," said the delighted publisher. "Wow!"

Paul McPherson, exec VP of McGraw-Hill Publications and MPA chairman, said, "George is a perfect choice for the award."

Mr. Grune joined *Reader's Digest* in 1960. He held positions as New York ad sales director, marketing director of the U.S. edition, VP-director of international advertising, VP-director of Pacific operations and deputy director of international operations.

In 1976 he was named VP-director of the condensed books, general books and recorded music division. A year later he was elected to the board. He was named publisher in January 1984 and a few months later chairman-ceo.

At a formal dinner Jan. 26, Mr. Grune will receive a representation of the award, a crystal Steuben urn.#

CORRECTIONS & CLARIFICATIONS

- Del Monte USA's holiday promotion to hispanics (AA, Oct. 26, P. 8) is handled by Solem/Loeb & Associates and BCT Communications, both San Francisco.
- Ogilvy & Mather, New York, is the ad agency for Beecham Products' new N'ice throat spray (AA, Oct. 19, P. 70).
- U.S. advertising-related employment at Leo Burnett Co., Chicago, was 1,854 on Oct. 1, up 4.9% from Jan. 1. The larger Oct. 1 job-count number originally supplied by Burnett (AA, Nov. 16, P. 3) reflected budgeted positions, some of which were unfilled.#

November 23, 1987 Special Issue

Advertising Age

Crain's International Newspaper of Marketing

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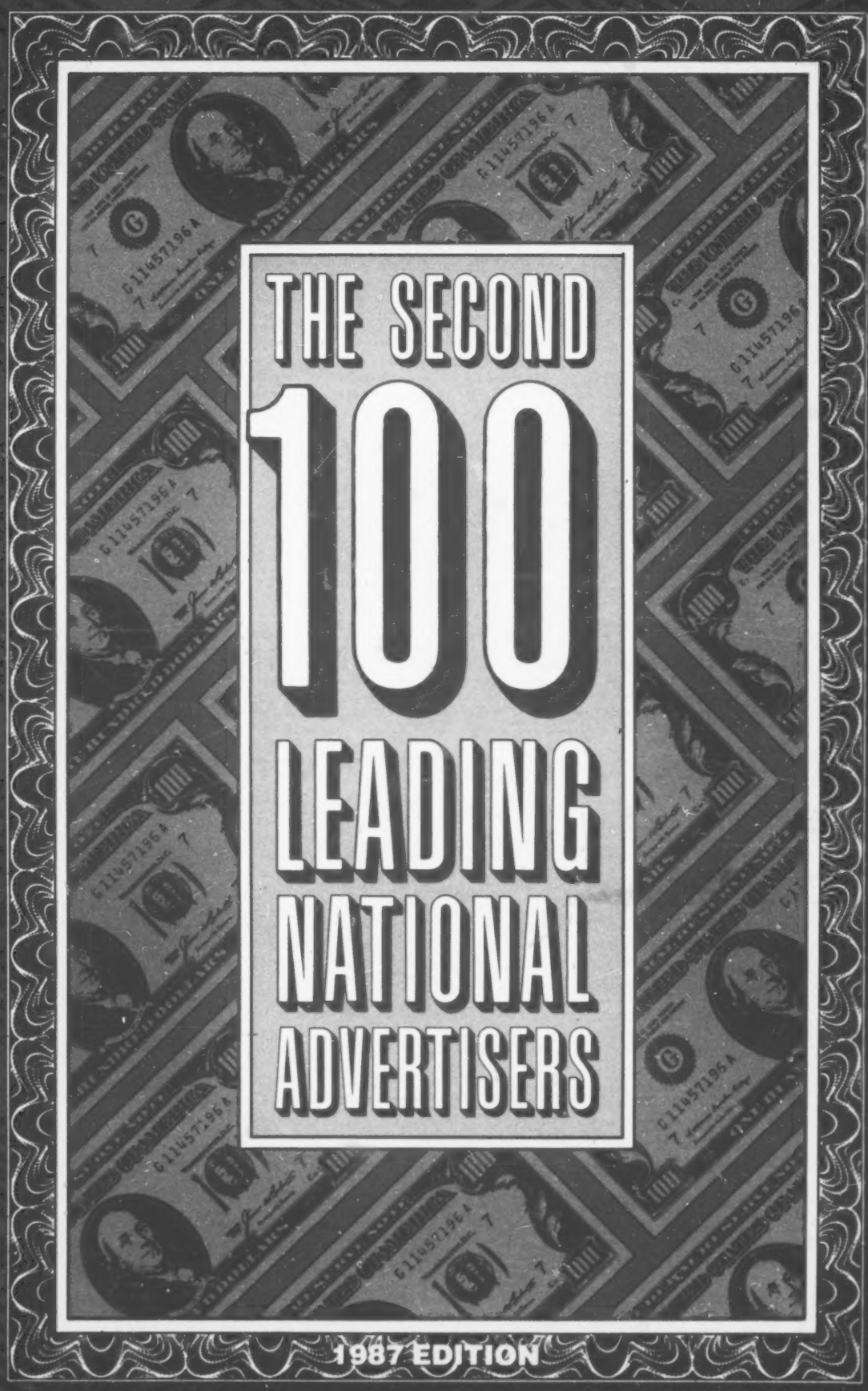

Special Issue

'86 ad spending soars

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The Second 100 offer innovation: from wristwatch paging systems, digital VCRs, a $4,995 car that runs, a radiator guarantee, Captain Power and the Soldiers of Fortune, to a life-extending AIDS drug.

By R. CRAIG ENDICOTT

The nation's Second 100 leading national advertisers revved up their ad spending to $5.51 billion in 1986, 19.9% over the previous year, far above their First 100 competitors, who recorded only marginal spending increases last year.

Companies that qualified for AD AGE's latest Second 100 list demonstrated the tendency among advertisers to increase their ad spending in non-media areas more than in the traditional media categories. Media's percentage of total ad spending by the Second 100 dropped from 65.5% of the total in 1985 to 61% in 1986 as non-media forms of advertising grew 35.7% in dollars to $2.15 billion.

But total media dollars also increased—to $3.36 billion, up 11.7% for the same companies in 1985—as the Second 100 advertisers increased their share of ad dollars spent by all advertisers on network TV, magazines and national newspapers. By comparison, AA's Top 100 advertisers experienced a decline in shares in these media categories.

The elite 100, covered in AA's Sept. 24, 1987 report, recorded a parsimonious 3.4% year-to-year increase in ad spending. And even though their composite spending total of $27.17 billion far outdistanced the Second 100, the composite year-to-year dollar growth of $914 million of the Second 100 surpassed the $894 million increase of the Top 100.

Volatility characterized the composition of the Second 100 chart in this third annual report. There were 39 new entries to the list. Only nine were dropouts from the 100 leaders, having fallen short of the Top 100 ad spending cutoff of $82.7 million. Twelve of the new listings came from among retailer categories, both food and general merchandise, and food marketers.

Borden Inc., New York, surged to the top of the Second 100 chart with total spending of $82 million in 1986, up 43% from the prior year. The Borden total also was 16.1% greater than the chart's 1985 leader, Levi Strauss & Associates, at $70.6 million that year. In fact, 12 advertisers topped this previous high last year.

Borden's spending patterns illustrate the trend by marketers to invest in non-media forms of advertising. Borden spent 73% of its total advertising on what it termed "promotions"—give-aways, samples, cents-off, point-of-sale, etc. Such emphasis on unmeasured advertising is more the rule than the exception today, particularly among financial institutions and food, pharmaceutical and toiletries and cosmetics marketers.

Network TV was the medium that attracted the largest dollar volume among the Second 100. The 10.7% growth brought the group to $1.08 billion. The Top 100 showed 3% growth in network TV to $6.36 billion.

However, the Second 100 network totals moved the group to 12.5% of the $8.6 billion spent by all advertisers in the medium in 1986, from 11.7% in 1985, while the Top 100 dropped as a percentage of total network TV spending to 74% from 74.3% in 1985. Mennen Co., at $33.4 million, was the biggest Second 100 network TV spender. Procter & Gamble, the nation's leading advertiser, invested $456.3 million in network TV last year.

The Second 100 increased its magazine spending by 7.3% to $546 million and built up the group's total percentage of the $5.1 billion spent by all advertisers in the medium in 1986, from 10.3% to 10.7%. At the same time, the 100 leaders increased their spending in magazines 2.7% to $2.34 billion, leaving them with a 45.8% share of total magazine spending, down from 46.3% in 1985. The Second 100's leading magazine spender was Capital Cities/ABC with $30.6 million, or 55.3% of its total media expenditures.

Newspaper advertising for the Second 100 grew 15.8% to $233 million, boosting the group's percentage of the national medium's $3.66 billion total, from 5.5% to 6.4%. The Top 100 spent $950 million in the medium, down 2% in 1986, and cutting their percentage of all newspaper spending to 25.9% from 26.7%. The leading Second 100 newspaper spender was Trans World Airlines with $29.3 million, or 60% of its total media outlay.

In spot TV spending, both the Second 100 and the Top 100 saw share declines in 1986. Despite a 9.1% spending increase in spot TV to $1.01 billion in 1986, the Second 100's share of the $7.79 billion total slipped from 13.2% to 13%; the Top 100 total of $3.26 billion, up 5.4% in dollars, dropped from 43.8% to 41.8% of the total. Imasco Ltd. (Hardee's and Peoples Drug Stores) was the Second 100 leading spot TV spender with $32.8 million, or 95% of its total measured advertising.

Composite totals for the Second 100 disguise the fact that two-thirds of the advertisers propped up the rest, as ad spending levels for 34 on this Second 100 list actually declined last year.

Economic conditions probably contributed to some of the decline, because ad budget cuts are a way to hold down expenses. Fifteen of the 34 experienced a decline in earnings from 1985 to 1986. Three other marketers had lower profits in 1985 over 1984 and may have seen 1986 a catch-up year.

Six of the 15 recording both a decline in advertising and earnings were based abroad. While reasons for their decline in advertising vary among companies, the drop in earnings was often traced to the conversion of a weak dollar into a stronger local currency.

Among 24 foreign marketers on the list, nine suffered sales declines and five others reported a sales growth of 5% or less, returns traced largely to the currency differential. Little wonder the Japanese, who face voluntary import quotas, are building U.S. plants to keep manufacturing costs and sales in the same currency. Among the Second 100, Isuzu, Subaru and Mitsubishi are building such facilities, and the new upstart, Korea-based Hyundai, is contemplating such a move for its autos.

Buyouts, potential or otherwise, affected Safeway Stores, Kenner Parker Toys, Dayton Hudson Corp., Lucky Stores, Levi Strauss & Associates, Hiram Walker-Gooderham & Worts, Zayre Corp. and American Stores.

Affinity marketing proved popular among the Second 100 as Citicorp and MasterCard offered new bank cardholders either mileage credits or free tickets on airlines; General Motors offered roundtrip tickets on TWA for buyers of the Buick Riviera; VF Corp. (Lee's and Maverick jeans) began pushing American-made Pepsi Apparel America casual clothing.

Next year's advertising and marketing programs for at least seven of the Second 100 will be dominated by the 1988 Winter and Summer Olympics for which they are sponsors, and Capital Cities/ABC sees the sports extravaganza as rejuvenating its ABC network ad sales.

With agency mergers and corporate restructuring activity at a peak, there were wholesale changes in agencies representing the Second 100 companies. If there is an advertising agency with a smile on its face it must surely be AC&R/DHB & BESS. It is now the agency for five Second 100 leaders after being awarded both Hattori-Seiko Co. and Zayre Corp. in the past year.

Second 100 leading national advertisers

Rank	Company	Ad spending	Rank	Company	Ad spending	Rank	Company	Ad spending
101	Borden Inc.	$81,962.1	135	Whirlpool Corp.	$61,796.0	169	Domino's Pizza	$48,488.5
102	Matsushita Electric Industrial Co.	79,808.8	136	BMW AG	61,545.3	170	Triangle Publications	48,425.6
103	North American Philips	79,376.9	137	Hattori-Seiko Co. Ltd.	60,912.3	171	Tyson Foods	48,264.7
104	Trans World Airlines	78,782.1	138	Cadbury Schweppes PLC	60,271.9	172	Ocean Spray Cranberries	47,328.7
105	Daimler-Benz AG	77,423.0	139	Mattel Inc.	59,872.2	173	Fruit of the Loom	46,409.8
106	Levi Strauss & Associates	76,754.8	140	Southland Corp.	59,657.0	174	Chevron Corp.	45,412.9
107	Wal-Mart Stores	75,529.4	141	Avon Products	59,513.9	175	Tambrands Inc.	44,771.8
108	F.W. Woolworth Co.	74,083.2	142	Ciba-Geigy Ltd.	59,488.3	176	Van Munching	44,750.3
109	Metropolitan Life Insurance Co.	72,964.3	143	Lucky Stores	58,731.6	177	Melville Corp.	43,835.8
110	Blue Cross & Blue Shield Assn.	71,518.9	144	Fuji Heavy Industries	58,718.1	178	Tri-Star Pictures	43,476.4
111	Castle & Cooke Inc.	71,318.3	145	Hallmark Cards	58,366.5	179	Bally Manufacturing Corp.	43,467.6
112	Polaroid Corp.	71,248.7	146	Imasco Ltd.	57,633.0	180	Reynolds Metal Co.	43,416.0
113	Prudential Insurance Co. of America	70,618.0	147	Apple Computer	57,596.0	181	News Corp. Ltd.	43,154.1
114	Jerrico Inc.	69,478.1	148	SmithKline/Beckman Corp.	56,699.7	182	Amoco Corp.	42,914.0
115	United Biscuits Holdings PLC	69,304.9	149	Royal Crown Cola Cos.	55,565.5	183	Dow Jones & Co.	42,565.7
116	George A. Hormel & Co.	69,068.1	150	Minolta Camera Co. Ltd.	55,505.4	184	Holiday Corp.	41,532.3
117	Carter-Wallace Inc.	69,046.1	151	Kimberly-Clark Corp.	55,298.3	185	Volvo AB	41,358.8
118	Ameritech	68,954.6	152	Coleco Industries	54,830.5	186	Federal Express Corp.	40,258.4
119	Gulf + Western Industries	68,635.4	153	NWA Inc.	52,882.4	187	Hearst Corp.	39,034.1
120	Southwestern Bell Corp.	67,608.5	154	Isuzu Ltd.	52,556.9	188	De Beers Consolidated Mines Ltd.	36,385.6
121	Cotter & Co.	67,269.7	155	Winn Dixie Stores	52,528.8	189	Kenner Parker Toys	36,334.6
122	Canon Inc.	67,084.9	156	MasterCard International	52,393.0	190	BankAmerica Corp.	36,040.2
123	Dayton Hudson Corp.	66,951.3	157	Zayre Corp.	52,352.6	191	Faberge Incorporated	35,952.9
124	Alberto-Culver Co.	66,724.5	158	Hyundai Motor Co.	52,330.7	192	Visa International	35,444.7
125	MCI Communications Corp.	66,646.3	159	Reckitt & Colman PLC	51,923.5	193	Mitsubishi Motors Corp.	34,514.0
126	Estee Lauder Inc.	66,630.7	160	Black & Decker Corp.	51,814.7	194	Citicorp	33,731.0
127	American Stores	66,244.4	161	Squibb Corp.	50,884.0	195	Turner Broadcasting System	33,351.4
128	Wellcome PLC	64,899.5	162	Franklin Mint	50,529.6	196	State Farm Mutual Auto Ins. Co.	32,543.8
129	First Brands Corp.	64,830.5	163	Sandoz Ltd.	50,403.1	197	Hiram Walker-Gooderham & Worts	32,518.9
130	Capital Cities/ABC	63,117.1	164	Safeway Stores	50,111.7	198	Canandaigua Wine Co.	31,898.5
131	Seven-Up Co.	62,821.9	165	NEC Corp.	50,060.3	199	Thompson Medical Co.	31,635.3
132	A.H. Robins Co.	62,742.3	166	US West	50,032.2	200	Bertelsmann AG	29,217.9
133	VF Corp.	62,208.8	167	Wickes Cos.	49,694.3			
134	Mennen Co.	61,802.0	168	3M Co.	48,883.2			

Note: Dollars are in thousands

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S-8 Alberto-Culver Co.
S-8 American Stores Co.
S-8 Ameritech
S-9 Amoco Corp.
S-9 Apple Computer
S-9 Avon Products
S-10 Bally Manufacturing Corp.
S-11 BankAmerica Corp.
S-16 Bertelsmann AG
S-16 Black & Decker
S-16 Blue Cross & Blue Shield
S-16 BMW AG
S-17 Borden Inc.
S-18 Cadbury Schweppes PLC
S-18 Canandaigua Wine Co.
S-18 Canon Inc.
S-19 Capital Cities/ABC
S-20 Carter-Wallace Inc.
S-20 Castle & Cooke Inc.
S-20 Chevron Corp.
S-21 Ciba-Geigy Ltd.
S-21 Citicorp
S-22 Coleco Industries
S-22 Cotter & Co.
S-22 Daimler-Benz AG
S-22 Dayton Hudson Corp.
S-23 De Beers Consolidated Mines
S-23 Domino's Pizza
S-26 Dow Jones & Co.
S-26 Faberge Incorporated
S-26 Federal Express Corp.
S-26 First Brands Corp.
S-26 Franklin Mint
S-27 Fruit of the Loom
S-27 Fuji Heavy Industries
S-28 Gulf + Western Industries
S-28 Hallmark Cards
S-28 Hattori-Seiko Co.
S-29 Hearst Corp.
S-29 Holiday Corp.
S-29 George A. Hormel & Co.
S-30 Hyundai Motor Co.
S-30 Imasco Ltd.
S-30 Isuzu Ltd.
S-31 Jerrico Inc.
S-31 Kenner Parker Toys
S-32 Kimberly-Clark Corp.
S-32 Estee Lauder Inc.
S-32 Lucky Stores
S-32 MasterCard International
S-33 Matsushita Electric Industrial Co.
S-33 Mattel Inc.
S-34 MCI Communications
S-34 Melville Corp.
S-34 Mennen Co.
S-34 Metropolitan Life Insurance Co.
S-35 Minolta Camera Co.
S-35 Mitsubishi Motors Corp.
S-36 NEC Corp.
S-36 News Corp. Ltd.
S-36 North American Philips
S-37 NWA Inc.
S-37 Ocean Spray Cranberries
S-37 Polaroid Corp.
S-38 Prudential Insurance Co.
S-38 Reckitt & Colman PLC
S-38 Reynolds Metal Co.
S-39 A.H. Robins Co.
S-39 Royal Crown Cola Cos.
S-40 Safeway Stores
S-40 Sandoz Ltd.
S-40 Seven-Up
S-41 SmithKline/Beckman Corp.
S-41 Southland Corp.
S-42 Southwestern Bell Corp.
S-42 Squibb Corp.
S-42 State Farm Mutual Automobile Ins. Co.
S-43 Levi Strauss & Associates
S-43 Tambrands
S-44 Thompson Medical Co.
S-44 3M Co.
S-44 Trans World Airlines
S-45 Triangle Publications
S-45 Tri-Star Pictures
S-45 Turner Broadcasting System
S-46 Tyson Foods
S-46 United Biscuits Holdings
S-46 US West
S-47 Van Munching
S-47 VF Corp.
S-48 Visa International
S-48 Volvo AB
S-48 Hiram Walker-Gooderham & Worts
S-48 Wal-Mart Stores
S-49 Wellcome PLC
S-49 Whirlpool Corp.
S-49 Wickes Cos.
S-50 Winn-Dixie Stores
S-50 F.W. Woolworth Co.
S-50 Zayre Corp.